

Indiana Wellness Summit Presentation

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Today's Presenters

- Nathan Mowery, President of Activate Healthcare of Indiana
- Jason Vore, Activate Healthcare Central Indiana Region
Vice-President of Operations
- Lisa Arvesen, Activate Healthcare Southern Indiana Region
Vice-President of Operations
- Patricia Wilson, Fund Administrator, Indiana Teamsters
Health Benefits Fund





Activate Healthcare partners with companies that understand the value of a healthier workforce

We work with you to understand your current situation and needs and design a custom healthcare solution that lowers costs and increases organization member productivity, morale and retention.

But here's what sets Activate Healthcare apart:

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Activate Healthcare key differentiators



We listen first, which enables us to tailor solutions for you.

- Everything fits – clinic design, clinic hours, rollout process, integration with wellness programs.
- You are actively involved in selecting the right providers, which ensures a great fit.
- We hold monthly meetings with provider teams and organizations, so we can listen and improve.

Patient activation is at the center of everything we do.

- We proactively engage people with annual comprehensive health and wellness assessments.
- Proactive care enables serious conditions and risks to be managed early.
- Coaching is part of every visit, so we identify root causes and help change behavior.

We optimize the whole as an integrated system.

- We provide strategic plans to the organization to change the culture of health.
- We integrate and evolve your wellness programs to effectively integrate with the clinic's services.
- We guide the healthcare continuum in the community and enable shared access.

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Our results

- + Greater than **90% working member participation**
- + Average annual **physician turnover near zero**
- + Average patient satisfaction of **4.8 on a 5-point scale**
- + We measure and improve biometrics and health – **improving health and keeping healthy people healthy**
- + We regularly **reduce total healthcare costs for organizations 15% to 25%**
- + Participating organizations **get back \$1.50 for each \$1 invested** each year (across all measured clients)



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The team that serves you

Our typical medical team:

- A primary care physician
- Advanced practice provider
- Two medical assistants

We locate the clinic at or near your organization's location.

Each team serves 1,500 - 3,000 members.

For larger employers we create multiple teams, each focused on their own members.

We can start with a smaller number of members and grow incrementally as needed.



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We proactively encourage comprehensive physical assessments to avoid future catastrophic events.



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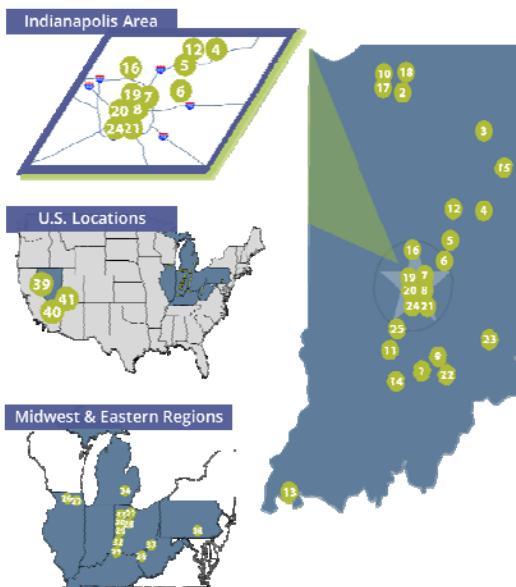
We activate patients to change their behavior

- Patient behavior is the root cause of most health cost issues
- Activate providers help the patient understand their conditions and how behaviors can make the difference
- We engage and empower patients to live better lives
- The result is smarter behavior and less medical intervention



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Where are Activate Healthcare Clinics Located?



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Goals of Today's Presentation

- Provide an overview of clinic services and wellness programs of three different employment/benefit fund environments
- Identify challenges that exist in each environment to activating and improving the health status of members
- Identify tactics that have been successful in patient engagement
- Provide an interactive opportunity for Q&A



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Case Study 1

Indiana Teamsters Health Benefits Fund



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Client Profile

- Indiana Teamsters Health Benefits Fund (ITHBF) supports one of the largest union organizations in the United States in the Indiana Teamsters Organization (with multiple Locals across Indiana).
- ITHBF supports Teamsters Local 135 (headquartered in Indianapolis), which is one of the largest Local Unions within the International Union. Local 135 represents approximately 14,000 members and six offices across Indiana, and members work in industries such as freight/trucking, warehousing, manufacturing, construction, and route sales.
- ITHBF is the organizational structure through which Indiana Teamsters gain and customize their health, dental, vision, and retirement benefits.
- Anthem is the current primary provider network for ITHBF members, but there are other avenues that can support Teamsters members and families with efficient, effective, and low cost or free healthcare services (such as the partnership with Activate Healthcare detailed next).



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Unique Client Organizational Features



- Indiana Teamsters Health Benefits Fund supports members that are spread out all over the state of Indiana, necessitating as much consistency of benefits offered as possible to help ensure that everyone has access to similar healthcare services
- Like many organizational populations, Teamsters members have many health conditions and needs that require ongoing management and support, such as:
 - Diabetes
 - High blood pressure
 - High cholesterol
 - Weight loss /lifestyle management opportunities
- There are also multiple languages spoken among the Teamsters population, including English, Spanish, and Burmese
- To help support the geographic, medical, and language-related needs highlighted above, ITHBF has partnered with Activate Healthcare to provide customized healthcare support to help eligible members and dependents access wellness and primary/acute care, get healthier, and reduce overall healthcare costs—the Benefits Fund had a net savings of \$4.9M after the first three years of implementing the Activate Clinic

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Client “Home Clinic” Overview



- ITHBF and Activate operate a clinic that specifically serves eligible Teamsters and dependents located on the Southside of Indianapolis
- The clinic team includes 1 physician, 2 physician assistants, and 3 medical assistants
- During the last 12-month period, there were over 4,900 appointments seen at the main Teamsters clinic, including over 600 wellness physicals, 400 DOT physicals, and 1,400 acute visits
- Additionally, in that same period over 7,300 prescriptions were filled from the clinic’s on-site formulary (high-quality generics, no controlled substances – primarily chronic condition and acute meds)
- Many Teamsters members and dependents take advantage of the incentives that ITHBF offers including cash payment for a patient getting a biometric screening, a physical, and a coaching visit where health goals are set (and monitored over time)
- In addition to the patient volume seen in Indianapolis, many eligible ITHBF members live all over Indiana, and need access to similar care to what’s provided at the Indianapolis clinic - this presents a challenge and opportunity on how to serve them within the Activate model in a location that’s more convenient for them

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Client Remote Clinic Access Overview



- To support the state-wide needs of members, Teamsters patients are able to access multiple Activate clinics all around the state of Indiana, including:
 - Northern Indiana: Mishawaka, South Bend and Ft. Wayne
 - Central Indiana: Anderson, Muncie and Indianapolis
 - Southern Indiana: Bloomington, Seymour, Bedford and Evansville
- Eligible Teamsters members and dependents are able to access the same (or very similar) services at the other Activate clinic locations that are provided in Indianapolis, with support for wellness and primary/acute care, medications, and health coaching
- Over the last 12-month period, over 1,800 appointments have been seen for Teamsters members across these additional Activate clinics
- Activate works with the Benefit Funds Administrator on health promotions, health information and education through the Fund's newsletter and communication process
- Activate and ITHBF leadership meet monthly to ensure alignment with short- and long-term population healthcare goals, strategies, and objectives and to continue supporting the success gained to date

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Lessons Learned



- Develop clear goals for the benefit and wellness plan, and meet regularly to discuss flow and progress – communication is key
- Have as consistent an approach as possible across all access points and all members to ensure continuity in experience and services offered
- Use data and client/patient feedback to identify the areas of ongoing opportunity – don't be afraid to make adjustments and changes based on measurement of data or patient experience
- Consider paying incentives, where possible, at time and point of service (e.g. gift cards handed to patient for physical or goals completion) – immediacy reinforces patient success, and administrative approach is easier to manage

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Case Study 2

MacAllister Machinery



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Client Profile

- MacAllister Machinery is Indiana's leading heavy equipment supplier, and is Caterpillar's exclusive Indiana dealer and servicer of new, used, and rental equipment (in addition to sales, service, and rental of many other manufacturers' equipment)
- Types of equipment supported by MacAllister include:
 - Construction
 - Agricultural
 - Electric power/generators
 - School buses
 - Railroad machinery
- MacAllister has 20+ locations spread out around Indiana, and approximately 950 employees
- MacAllister also has more than 15 locations in Michigan



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Unique Client Organizational Features

- MacAllister Machinery's main headquarters is located in Indianapolis – and due to the remote organizational structure and multiple locations, there are many employees located both in and around Indianapolis as well as around Indiana
- Similar to other populations, MacAllister patients have many clinical conditions and needs that require support, including:
 - Diabetes
 - High blood pressure
 - High cholesterol
 - Weight loss /lifestyle management opportunities
- Some MacAllister patients also require DOT physicals due to the nature of their roles
- To provide support to their patients and eligible dependents, MacAllister has also partnered with Activate Healthcare to ensure their population has access to excellent primary, wellness, and acute care to help them get healthier and overall save cost—over the five years the Activate clinic and Activate program have been in place, MacAllister has seen a cumulative net savings in their benefit costs of \$2.4 million.



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Client “Home Clinic” Overview

- MacAllister Machinery's main clinic is currently on the premises of MacAllister's headquarters on the Eastside of Indianapolis – this clinic was the 2nd clinic Activate opened after the company started
 - The headquarters, along with the clinic, will be moving to a brand new location on the Southeast side of Indianapolis over the next couple of weeks
- The clinic team includes 1 physician, 1 physician assistant, and 2 medical assistants
- During the last 12-month period, over 2,800 appointments were seen at the main clinic, including over 1,100 wellness physicals, 115 DOT physicals, and 650 acute visits.
- Over that same period over 3,500 prescriptions were filled from the clinic's on-site formulary (high-quality generics, no controlled substances – primarily chronic condition and acute meds)
- Eligible MacAllister employees and dependents can take advantage of the incentives that MacAllister offers - in exchange for completion of a biometric screening, physical, and coaching patients are able to qualify for monetary support for health club memberships, health equipment, health classes, etc.
- Due to the distributed nature of the MacAllister workforce across Indiana, Activate and MacAllister have designed an approach to enable access to services and care for patients that both live near an Activate clinic and for those who do not



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Client Remote Clinic Access Overview

- MacAllister Machinery eligible members that live near one of 8 Activate locations across Indiana are able to access those clinics to ensure they receive the clinical support and guidance that they need
- Additionally, over a 4-month period each year, a subset of the main clinic team will travel to over 12 MacAllister locations within Indiana to perform biometric screenings, physicals, and coaching visits – this allows eligible employees and dependents that may not live or work near an Activate location to have the same access to the wellness services and incentives as those that do visit an Activate clinic
- Over the last 12-month period, over 1,200 appointments occurred for eligible MacAllister patients that visited an Activate clinic outside the main MacAllister location
- And, over 1,500 appointments occurred at MacAllister locations across Indiana through the travel approach with an Activate provider team described above
- Activate and MacAllister representatives meet regularly and often to ensure that MacAllister’s health benefits plan and overall organizational goals and objectives are aligned with Activate’s clinical approach



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Lessons Learned

- Regular reporting is important – it helps to meet to understand progress and potential tweaks needed to help patients achieve their wellness and benefits goals
- Clinic team travel to locations where patients are located may be necessary to support a consistent baseline of access and service to remote employees and dependents
- Inclusion of clinic team in discussions with client leadership to help plan and guide operations and wellness program planning is essential to ensure a clear scope and approach is identified



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Case Study 3

Old National Bank



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Client Profile

- Old National Bancorp is the largest financial services bank headquartered in Indiana and one of the top 100 banking companies in the U.S.
- It is a regional bank with over 150 retail branches operated by Old National Bancorp and headquartered in Evansville, Indiana
- Its primary banking footprint is in Indiana, Kentucky, Michigan, and Wisconsin
- Old National strives to be a best place to work, and that includes supporting associates in all aspects of life and wellness is a key component of their benefit and compensation plans
- To help support the geographic and medical needs, ONB has partnered with Activate Healthcare to provide customized healthcare support to help eligible members and dependents access wellness and primary/acute care, get healthier, and reduce overall healthcare costs



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Unique Client Organizational Features

- ONB members have many common health conditions that are being managed within the clinics such as:
 - Hypertension
 - Asthma
 - Diabetes
 - CHF
- Activate supports this population through a “home” clinic, opened just under a year ago
- Based on the geographic proximity to Activate Clinics, ONB has access to 12 other Activate clinics throughout the state of Indiana
- Approximately 2800 members are able to utilize an Activate Clinic for healthcare services



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Client “Home Clinic” Overview

- Old National Bank has a clinic in downtown Evansville, on their main office campus where 1,826 people have access to the services
- The clinic team consists of 1 physician, 1 nurse practitioner and 2 medical assistants
- Over the past 9 months almost 1,550 visits have occurred in the home clinic
- Acute care, wellness physicals, disease management, coaching, labs and generic medications are provided within the Activate clinic model
- Because many associates live all over Indiana and need access to care, this presents a challenge and opportunity on how to serve them within the Activate model.



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Client Remote Clinic Access Overview

- To support the state-wide needs of members, ONB members are able to access 12 additional Activate clinics all around the state of Indiana; receiving the same services as in their home clinic
- ONB *well* - committed to supporting all employees health and well-being, all are eligible for an incentive of a full day off with pay if they complete biometric screening, health assessment, preventive screenings, health education events and challenges
- This partnership between ONB and Activate offers an integrated and personalized wellness experience
- Activate developed a wellness hub where employees access health and wellness activities, track their rewards, and engage in tailored events to inform, educate and improve their health
- Employees can access an Activate clinic for biometric screenings, health profile and tailored coaching sessions
- There are over 1,500 employees who do not have access to an Activate clinic. A travel team provides biometric screenings and flu shots to these employees, and they are also able to engage in remote coaching sessions from the home clinic provider team.



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Lessons Learned

- Lessons learned are still being learned as this site is embarking on their first anniversary.
- Develop clear goals for the benefit and wellness plan – if you don't know where you are going, you most certainly will not get there. A transition from prior wellness vendor requires time to embrace necessary changes.
- Use technology to achieve your goals – “virtually being there” can work
- The depth and breadth of services throughout a large geographic area add another element of complexity. Recognize that it's not a 'one size fits all'



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Questions?



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THANK YOU!

